Welcome to the IECDB Web Reporting System's Help Site

There are three basic areas:

Statement of Organization (DR-1)

Disclosure Summary Report (DR-2)

Statement of Dissolution (DR-3)

When using the IECDB Web Reporting System each page will contain a help button that will pop-up a new window with help for the current page or area. This button is located in the upper-right hand side of each non-help screen.

NOTE: For optimal use of the web reporting system, use versions 5.0 or newer of Microsoft Internet Explorer and Netscape. See links below to download most current versions.

DISCLAIMER: This is abbreviated "help" and is not intended to be legal advice or a restatement of every campaign finance statute or rule. Please refer to Iowa Code chapters 68A and 68B, the Board's rules in Chapter 351 of the Iowa Administrative Code, or contact the Board's staff for a complete listing of all relevant statutes and rules. Referring to the fact that a particular statute or rule was not included in this "help" section will not act as a defense if a complaint is filed with the Board.

Words from IECDB

We appreciate your interest in the Board's web-based electronic filing system. The system was designed in order to further two of our goals. First, to provide an efficient method for committees to register and file the disclosure reports required by Iowa Code chapter 68A. Second, to make information about filed reports available to the public as quickly as possible.

The advantage of web-based filing is that any committee with access to a web browser may request a logon and password and will be able to file campaign finance reports on-line, regardless of location or what type of computer system is used for Internet access. No software to load on your PC! If your PC "crashes," you can access the site from another computer with Internet access, including your local library. All you need is your userid and password.

In addition to the convenience of being able to enter or view information from any Internet connected PC, there are many other advantages to using the system for disclosure reporting. One of these advantages is automation. Many functions that would need to be manually performed by a paper filer, such as adding each page, entering the totals, transferring totals to the summary page are automatically performed for you by the system.

Another advantage is that it retains your "contact" information (contributors and vendors) so that you do not need to repeatedly enter address information for them. For example, perhaps you wrote several checks to the ABC Printing Company for brochures. The first time, you will need to enter the ABC Printing Company and its address. The next time you have a transaction with the ABC Printing Company, you will just select contact type "vendor" from the drop-down list. Click on "Find Contact," enter all or part of the name and select it from the list. You will not need to enter address details for this contact again unless it changes (see contact HELP for making changes).

The system also includes a complete list of all committees. Therefore, if you have a transaction involving a committee, you would simply select "Find Committee" on the screen for adding a contribution. Then enter the committee number or all or part of the committee name, click on "Submit," select the appropriate committee, and click on "Done." The name and address details are automatically entered from data in IECDB records.

Committees can go in and out of the system as often as they like during the filing period. Create the filing period, and then add transactions as they come up. When it is time to submit the report, click on "DR2 Submit."

NOTE: The Board will not have access to your data until you click on SUBMIT. Your data will be maintained on a secure server.

Remember when viewing filed reports they may contain errors that, when audited by IECDB, will require additional information or correction.

First Steps

After filing the DR-1 (Statement of Organization) and receiving your password, you will be able to do the following on-line:

Amend the DR-1 to reflect any changes such as a new address, new treasurer, new election year;

File or amend your DR-2 (Disclosure Report);

File your DR-3 (Notice of Dissolution) to end your filing obligation.

These three options are presented on the left side of the screen, as DR1, DR2, and DR3. Click on the one you want to use.

DR-1 - The DR-1 Statement of Organization is amended by going to the tab for the changes you want to make. For example, "treasurer" tab for a change to treasurer or treasurer address, "bank account" tab for a change or addition to bank accounts. After making the changes, click "Submit." Click "Submit" only once.

DR-2: "DR-2 Home" shows a summary total of all transactions entered for the period. The various other tabs take you to the appropriate schedule for entering information. For example, click "Contributions" tab to enter contributions or money taken in.

DR-3: When the campaign is over and the final report is filed, submit the DR-3 to close the committee. Follow the instructions that come up after you click on DR-3.

When it is time to begin a new filing period, go to DR-2 and click on "Create a New Reporting Period."

To amend a DR-1, click on "DR-1," make the changes and submit.

To amend a filed disclosure report (DR2), click on "DR-2, view history" to select the period, unless it is the most recent, and make the change. It is not necessary to click on submit.

"Contacts" are the individuals, businesses, organizations, and committees that have transactions with your committee. A complete list of committees is incorporated in the system. Contacts unique to your committee may be added from the "DR-2" at the left side of screen, or as you are entering transactions to the schedules.

Tips and Tricks for Electronic Filing with IECDB Web Reporting System

The following list of techniques, suggestions, and other tidbits may expand the functionality, fun, and enjoyment of using this application:

When entering text into a web form you might find it quicker to use the keyboard (TAB) key.

Pressing the (TAB) key will move your cursor to the next box.

Pressing the (SHIFT + TAB) keys will move your cursor to the previous box.

If your cursor is positioned on a button you may execute (simulate a click) by hitting the (ENTER) key.

Type first letter (or number) of selection in a drop-down box and the first occurrence of that letter will appear. Type the same letter (or number) and the next occurrence in the list will appear. This means that in a "state" field, typing "I" will bring up "IA" for "Iowa". In a "year" field, click on "2" for "2000", "2" again for "2001", etc. Or use your arrow keys to move through the drop down list, then TAB out when your selection appears.

To take out a date, type "mm" for month, "d" for day, "y" for year.

Required information fields have a * beside them.

View Auditor Notes for any adjustments, clarification by staff auditors, etc.

At least three characters must be typed for a search of your contacts.

PASSWORDS
8 characters
can be any combination of alpha/numeric
are case-sensitive
expire every 60 days and must be changed
if entered incorrectly five times, you will be locked out for eight hours (call IECDB to reset the password or wait).

After Registration, the ID referred to is the UserID, not the Committee ID number.

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Help Main for DR-1 Statement of Organization

There are sections for the DR-1 that must be completed:

Committee Information	Chair Person Information
Treasurer Information	Candidate Information
Parent Entity Information	Other Officer Information
Bank Account Information	

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DR-1 Rules:

Candidate Committees

An initial Statement of Organization should be filed within 10 days of the committee's accepting contributions, making expenditures, or incurring indebtedness exceeding $750. Amended, or corrected, Statements of Organization must be filed within 30 days of any changes to this information.

PAC and Party Committees

PAC and Party committees are to file their initial Statement of Organization within 10 days of the committee's accepting contributions, making expenditures, or incurring indebtedness exceeding $750. Amended, or corrected, Statements of Organization must be filed within 30 days of any changes to this information.

Help for DR-1 Chair Information Screen

Form Fields:

Name	Type	Required
First Name	Alpha/Numeric	Yes
Middle Initial	Alpha/Numeric	No
Last Name	Alpha/Numeric	Yes
Street Address	Alpha/Numeric	Yes
City	Alpha/Numeric	Yes
State	Select Box	Yes
Zip	Alpha/Numeric	Yes
Primary Phone	Numeric	Yes
Secondary Phone	Numeric	No
Email	Alpha/Numeric	No

Chair Information Rules:

Candidate Committees

Candidate committees are not required to name a chairperson, however if the committee has one, the name and address must be reported here.

PAC and Party Committees

Appointment of a chairperson is required and must be reported here.

The law requires that a political committee shall appoint both a treasurer and a chairperson, each of whom shall be at least 18 years of age.

Help for DR-1 Treasurer Information Screen

Form Fields:

Name	Type	Required
First Name	Alpha/Numeric	Yes
Middle Initial	Alpha/Numeric	No
Last Name	Alpha/Numeric	Yes
Street Address	Alpha/Numeric	Yes
City	Alpha/Numeric	Yes
State	Select Box	Yes
Zip	Alpha/Numeric	Yes
Primary Phone	Numeric	Yes
Secondary Phone	Numeric	No
Email	Alpha/Numeric	No

Treasurer Information Rules:

Candidate Committees

The law requires that candidates name a treasurer who is an Iowa resident of at least 18 years of age. It is allowable for a candidate to serve as treasurer, although it is not recommended. It is permissible for a candidate's spouse to serve as treasurer.

PAC or Party Committees

A PAC may either maintain all of the committee's funds in an Iowa bank account or have an Iowa resident serve as treasurer.

The law requires that a political committee shall appoint a treasurer who has reached at least 18 years of age.

Help for DR-1 Candidate Information Screen

Form Fields:

Name	Type	Required
First Name	Alpha/Numeric	Yes
Middle Initial	Alpha/Numeric	No
Last Name	Alpha/Numeric	Yes
Street Address	Alpha/Numeric	Yes
City	Alpha/Numeric	Yes
State	Select Box	Yes
Zip	Alpha/Numeric	Yes
Primary Phone	Numeric	Yes
Secondary Phone	Numeric	No
Email	Alpha/Numeric	No
Office Sought	Alpha/Numeric	Yes
County	Select Box	No
District Number	Numeric	No
Election Date	Select Box	No
Election Year	Select Box	No

Candidate Information Rules:

Candidate Committees

Candidates at the county level need to enter the county where the election will be held. State candidates need to enter their district number (does not apply to candidates seeking statewide office). All candidates enter the year they anticipate being on the ballot.

PAC and Party Committees

Does not apply.

Help for DR-1 Committee Information Screen

Form Fields:

Name	Type	Required
Committee Name	Alpha/Numeric	Yes
Committee Type	Select Box	Yes
Description/Purpose	Alpha/Numeric	Yes
County	Select Box	Yes - Depending on Committee Type
Political Party	Select Box	No

Committee Information Rules:

Candidate Committees

New committees must contain candidate's last name within the committee name.

PAC and Party Committees

Acronyms are permitted, but the full name of the committee must immediately follow in parentheses on the line provided for the committee name.

Help for DR-1 Officer Information Screen

Form Fields:

Name	Type	Required
First Name	Alpha/Numeric	Yes
Middle Initial	Alpha/Numeric	No
Last Name	Alpha/Numeric	Yes
Title	Alpha/Numeric	Yes
Street Address	Alpha/Numeric	Yes
City	Alpha/Numeric	Yes
State	Select Box	Yes
Zip	Alpha/Numeric	Yes
Primary Phone	Numeric	Yes
Secondary Phone	Numeric	No
Email	Alpha/Numeric	No

Officer Information Rules:

Candidate Committees

If a committee has additional officers, list them here. If they do not have a title, show the title as "officer".

PAC and Party Committees

If a committee has additional officers, list them here. If they do not have a title, show the title as "officer".

Help for DR-1 Parent Entity Information Screen

Form Fields:

Name	Type	Required
Name	Alpha/Numeric	No
Street Address	Alpha/Numeric	Yes - If Name is entered
City	Alpha/Numeric	Yes - If Name is entered
State	Select Box	Yes - If Name is entered
Zip	Alpha/Numeric	Yes - If Name is entered
Phone	Numeric	Yes - If Name is entered
Email	Alpha/Numeric	No

Parent Entity Information Rules:

Candidate Committees

Does not apply to candidates.

PAC and Party Committees

PACs may have parent entities, affiliates, or sponsors and when they do, the name and address of that entity is to be reported here. For example, the parent entity of a local franchise committee would be the utility company. This does not apply to statutory party committees.

Help for DR-1 Bank Account Information Screen

Form Fields:

Name	Type	Required
Primary Account	Checkbox	No
Account Type	Select Box	Yes
Account Number	Alpha/Numeric	No
Account Name	Alpha/Numeric	Yes
Bank Name	Alpha/Numeric	Yes
Street Address	Alpha/Numeric	Yes
City	Alpha/Numeric	Yes
State	Select Box	Yes
Zip	Numeric	Yes
Phone	Numeric	No
Email	Alpha/Numeric	No

Bank Account Information Rules:

Candidate Committees

Candidates must maintain a separate account in an Iowa institution unless using only personal funds of the candidate. It can be any type of account (however all expenditures and withdrawals from committee funds must be paid by check). If more than one account is used, list them all. The name on the bank account must match the name of the committee.

PAC and Party Committees

PAC and Party committees may either maintain all of the committee's funds in an Iowa bank account or have an Iowa resident serve as treasurer. The only exception is a group that is a permanent organization temporarily engaging in activity to expressly advocate for the passage or defeat of a ballot issue using only general funds of the parent organization (example: utility company using its funds to support utility franchise election). The name on the bank account must match the name of the committee.

Help for DR-1 Bank Account Information Screen

When a bank account changes, you need to first remove the Primary check, remove the account, then add the new account. The old account will still show as DELETED until the next change to the DR-1, then it will be taken off.

To remove the primary check, select the bank account from the list, then click on Edit to go to the account information. Uncheck the Primary box and save. Continue as above.

Help Main for DR-2 Disclosure Summary Report

Create Filing Period	Filing Period History
Contacts	Schedule A (Contributions)
Schedule B (Expenditures)	Schedule D (Unpaid Bills)
Schedule E (In Kind Contributions)	Schedule F1 (Loans Received)
Schedule F2 (Loans Repaid)	Schedule G (Consultant)
Schedule G2 (Consultant Expenditure)	Schedule H1 (Property Acquired)
Schedule H2(Property Sold)	

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DR-2:

Each time you need to begin creating a report, you must click on "New Filing Period" to create the DR-2 for the new period. From that DR-2 you will access reporting schedules as needed.

After you create your new filing period, this screen will be refreshed and show your beginning balance for the period. Totals are calculated for you when you enter transactions in any of the various schedules.

To amend, click on "View History", find the period that you need to make the change in, select it and click on "Done". That will take you to the DR-2 for that period.

If you have not yet filed your report, the period can be deleted by clicking on "Delete Unfiled DR-2".

To add a contact without entering transaction information, click on "Add Contacts".

To edit or delete a contact, click on "Find/Edit/Remove Contacts".

You can adjust your cash balance from this page by clicking on the "Adjust" button. The "Cascade" button adjusts balances forward from an amended report.

This page shows the filing status, beginning and ending dates of the report you are working with, as well as the due date. Be sure reports are submitted on or before the due date.

Help for DR-2 - Create a New Filing Period

1. Select the beginning year for the new filing period. For a PAC you do not need to select whether it is an election or non-election year. Click on Next.
2. If a candidate, indicate if it is an election or non-election year. If it is a special election, enter the date.
3. On the next screen select the period from the drop-down list.
4. The next page shows the period begin date and end date you chose and the filing deadline for the period you selected. Click on Finish.
5. The next screen should tell you that the period was successfully created and what the beginning balance is. If you are a new committee, this will be $0.00. Click on "Close".

Help for DR-2 Filing Period History

1. After multiple filing periods have been created, they can be reviewed or amended by clicking on "View History".
2. Click under "Selection" in the appropriate row for the period you wish to view.
3. Scroll to the bottom of the list and click "Done".
4. The DR2 screen will refresh and the period you selected will be available.

Help for DR-2 Contacts

To Add a New Contact:

1. On any of the schedules or DR-2 Home Page, click on "Add Contact(s)".
2. On the next screen select a contact type and then click on "Next". (An example of type "organization" is a PTO. Type "vendor" is a business contact, such as a bank, newspaper, or office supply store.)
3. Fill in the required information (complete name and address information) for the contact and click on "Save".
4. Required fields are marked with *.
5. Candidates must include relationship, when applicable.
6. To add more, Click on "Add Another Contact".
7. Fill in the required information (complete name and address information) for the contact and click on "Save".
8. On the next screen click on "Close", when finished.

To Find/Edit/Remove an Existing Contact:

1. Select the contact type you wish to find.
2. Click on "Find Contact".
3. Search for one of the contacts you just created and select it when it is brought back. At least three characters must be typed for a search of your contacts.
4. Click on "OK" in the pop-up window. You can now either "Edit or Remove" the contact, or just click on "Done" if you want to use that contact "as is".

To Find a Committee:

1. Click on "Find Committee" and follow instructions.

Help for DR-2 Schedule A Contributions

Schedule A Form Fields:

Name	Type	Required
Contributor	Alpha/Numeric	Yes
Date	Select Box	Yes
Amount	Numeric	Yes
Check #	Alpha/Numeric	Yes, when Contributor is a Committee
From Fund Raiser	Checkbox	No
Candidates Own Funds	Checkbox	No
Interest	Checkbox	No
Unitemized	Checkbox	No
Reverse	Checkbox	No
Explanation	Alpha/Numeric	No

Schedule A - Contributions

1. Click on the Contribution tab. The first time it will show no contributions. Click on the "Add Contribution" button to add a transaction.
2. On next screen click on Add Contact, Find Committee or Find Contact (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 - Schedule A - Contribution screen.
6. The information for the last contact you added will show up here, and now you can enter the contribution details for that contact.
7. Enter the required information for the contribution and click on "Save".
8. On the next screen click on "Add Another Contribution" and follow the above steps to add additional contributions.
9. If finished click on "Return to Contribution List".
10. When the report is complete, click on "DR-2 Submit".

1. For unitemized contributions under your level ($25 or less for candidates or PACs, $50 or less for county statutory committees and $200 or less for state statutory committees) place a check in the "Unitemized" box.
2. If the receipt is proceeds from a fundraiser auction, check the box "from fundraiser".
3. If you are reporting receipt of the candidates own funds, check the box for "Candidates Own Funds" and the name and address information will be automatically inserted.
4. If you are reporting interest earned, enter the contact information, then check the box for "Interest" and the explanation will be automatically inserted.
5. If you are reporting a reversal of money taken in, such as a contribution check that is returned for insufficient funds, enter the contact information, then check the box "Reverse". The amount will automatically be deducted from the contributions total.
6. Enter an explanation only for unusual circumstances, such as a reverse entry.
7. **NOTE:** All committees except ballot issues are prohibited from accepting any direct or

indirect contributions from corporations. Under certain circumstances, your committee may have accepted a refund from a corporation that is permitted. Check with IECDB if you have questions.

8. **NOTE:** Direct or indirect contributions from one candidate's committee to another are prohibited.
9. Anonymous contributions in excess of ten dollars are prohibited from being received.
10. The contributor is the name printed on the check.

Help for DR-2 Schedule B Expenditures

Schedule B Form Fields:

Name	Type	Required
Payee	Alpha/Numeric	Yes
Date	Select Box	Yes
Exp. Type	Select Box	Yes
Amount	Numeric	Yes
Check #	Alpha/Numeric	Yes, when a Committee is selected as Payee
Explanation	Alpha/Numeric	No

Schedule B - Expenditures

1. Click on the "Expenditure" tab. The first time it will show no expenditures. Click on the "Add Expenditure" button to add a transaction.
2. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 - Schedule B - Expenditure screen.
6. The information for the last contact you added will show up here, and now you can enter the expenditure details for that contact.
7. Enter the required information for the expenditure and click on "Save".
8. On the next screen click on "Add Another Expenditure" and follow the above steps to add additional expenditures.
9. When finished, click on "Return to Expenditure List".
10. When the report is complete, click on "DR-2 Submit".

1. Use the reverse entry under expenditure type to show checks lost or returned. The amount will automatically be deducted from total expenditures. Include an explanation in the "Purpose".
2. **NOTE:** Direct or indirect contributions from one candidate's committee to another are prohibited.
3. A candidate's committee is not permitted to transfer funds to a PAC except for fundraiser tickets for meals attended by the candidate and one guest up to $25 per ticket.

Help for DR-2 Schedule D Unpaid Bills

Schedule D Form Fields:

Name	Type	Required
Owed To	Alpha/Numeric	Yes
Date	Select Box	Yes
Exp. Type	Select Box	Yes
Amount	Numeric	Yes
Explanation	Alpha/Numeric	No

Schedule D - Unpaid Bills

1. Click on the "Debts" tab. The first time it will show no debts. Click on the "Add Debt" button to add a transaction.
2. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 - Schedule D - Unpaid Bills screen.
6. The information for the last contact you added will show up here, and now you can enter the details of the debt for that contact.
7. Enter the required information for the unpaid bill and click on "Save".
8. On the next screen click on "Add Another Unpaid Bill" and follow the above steps to add additional "Unpaid Bills".
9. If actual figure is unknown, indicate estimated in the explanation.
10. Include debts previously reported that remain unpaid.
11. If finished click on "Return to Debt List".
12. When the report is complete, click on "DR-2 Submit".

Help for DR-2 Schedule E In-Kind Contributions

Schedule E Form Fields:

Name	Type	Required
InKindContributor	Alpha/Numeric	Yes
Date	Select Box	Yes
Amount	Numeric	Yes
From Fund Raiser	Checkbox	No
Explanation	Alpha/Numeric	No
Exp. Type	Select Box	Yes

Schedule E - In-Kind Contributions

1. Click on the "In-Kind" tab. The first time it will show no in-kind contributions. Click on the "Add In-Kind Contribution" button to add a transaction.
2. An in-kind contribution is a good or service donated to a committee for which the committee would normally have to pay full market value.
3. This includes forgiveness of a debt or payment of a committee bill by an individual.
4. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the "Contact" type to find).
5. Enter or select the contact.
6. On the next screen click on "Close".
7. You are now back to the DR-2 – Schedule E – In-Kind Contributions screen.
8. The information for the last contact you added will show up here, and now you can enter the contribution details for that contact.
9. Enter the required information for the in-kind and click on "Save".
10. On the next screen click on "Add Another In-Kind Contribution" and follow the above steps to add additional in-kind contributions.
11. If the item donated was for resale at an auction or fundraiser, check the "From FundRaiser" box.
12. The itemization level for reporting in-kind contributions is the same as for monetary contributions.
13. In-kind corporate contributions are prohibited just as they are prohibited for monetary contributions. This would also apply to civil penalties paid by corporations on behalf of their PACs. (Exception: ballot issues)
14. If finished click on "Return to In-Kind List".
15. When the report is complete, click on "DR-2 Submit".

Help for DR-2 Schedule F1 Loans Received

Schedule F1 Form Fields:

Name	Type	Required
Lender	Alpha/Numeric	Yes
Date	Select Box	Yes
Amount	Numeric	Yes
From Fund Raiser	Checkbox	No
Candidates Own Funds	Checkbox	No
Explanation	Alpha/Numeric	No

Schedule F1 - Loans Received

1. Click on the "Loans Received" tab. The first time it will show no loans received. Click on the "Add Loan Received" button to add a transaction.
2. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 – Schedule F1 - Loans Received screen.
6. The information for the last contact you added will show up here, and now you can enter the loan received information for that contact.
7. Enter the required information for the loan received and click on "Save".
8. On the next screen click on "Add Another Loan Received" and follow the above steps to add additional loans received.
9. If finished click on "Return to Loans Received List".
10. When the report is complete, click on "DR-2 Submit".
11. **NOTE:** Loans are money received and deposited in the committee bank account.
12. **NOTE:** Outstanding loan balances automatically carry forward to next report.

Help for DR-2 Schedule F2 Loans Repaid

<u>Schedule F2 Form Fields:</u>

Name	Type	Required
Payee	Alpha/Numeric	Yes
Date	Select Box	Yes
Amount	Numeric	Yes
Forgiven	Checkbox	No
Explanation	Alpha/Numeric	No

Schedule F2 - Loans Repaid

1. Click on the "Loans Repaid" tab. The first time it will show no loans repaid. Click on the "Add Loan Repaid" button to add a transaction.
2. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 – Schedule F2 - Loans Repaid screen.
6. The information for the last contact you added will show up here, and now you can enter the loan repaid information for that contact.
7. Enter the required information for the loan repaid and click on "Save".
8. On the next screen click on "Add Another Loan Repaid" and follow the above steps to add additional loans repaid.
9. If a monetary loan is forgiven, in whole or in part, enter the transaction information in this section and check the box "Forgiven." Loans forgiven must also be listed as in-kind contributions (Schedule E) made to the committee.
10. If finished click on "Return to Loans Repaid List".
11. When the report is complete, click on "DR-2 Submit".

Help for DR-2 Schedule G Consultant

Schedule G Form Fields:

Name	Type	Required
Consultant Name	Alpha/Numeric	Yes
From Date	Select Box	Yes
To Date	Select Box	Yes
Amount	Numeric	Yes
Explanation	Alpha/Numeric	No

Schedule G - Consultant

1. Click on the "Consultant" tab. The first time it will show no consultant transactions. Click on the "Add Consultant Summary" button to add consultant summary details (Individuals or vendors providing third-party services to candidates' committees, such as an advertising agency that prepares and places radio or TV ads, must be listed here.).
2. On the next screen click on "Add Contact, Find Committee or Find Contact" (after you have selected the "Contact" type to find).
3. Enter or select the contact.
4. On the next screen click on "Close".
5. You are now back to the DR-2 – Schedule G – Consultant screen.
6. The information for the last contact you added will show up here, and now you can enter the consultant information for that contact.
7. Enter the required information for the consultant and click on "Save".
8. On the next screen click on "Add Another Consultant" and follow the above steps to add additional consultant transactions.
9. To enter details of expenditures by the consultant on behalf of the committee (i.e., payments to radio stations), click on "Return to Consultant List". This takes you to a list of the consultants you added for the period. Select the consultant, then click on the "Expense" button to the right of the consultant that you need to add expenditure transactions for (you may also edit or remove consultants here).
10. If finished click on "Return to Consultant List".
11. When the report is complete, click on "DR-2 Submit".
12. **NOTE:** PACs and statutory party committees are not required by statute to use this form.

Help for DR-2 Schedule G2 Consultant Expenditures

Schedule G2 Form Fields:

Name	Type	Required
Cons. Exp. Name	Alpha/Numeric	Yes
Payment Date	Select Box	Yes
Amount	Numeric	Yes
Explanation	Alpha/Numeric	No

Schedule G2 - Consultant Expenditures

1. Click on “Add Contact, Find Committee or Find Contact” (after you have selected the Contact type to find).
2. On the next screen click on "Close".
3. You are now back to the DR-2 - Schedule G - Consultant Expenditure screen.
4. The information for the last contact you added will show up here, and now you can enter the expenditure details for this consultant expenditure (contact).
5. After entering the required information for the consultant expenditure, click on "Save".
6. On the next screen click on "Add Another Consultant Expenditure" and follow the above steps to add additional consultant expenditures.
7. If finished click on "Return to Consultant Expenditure List".
8. **NOTE:** PACs and statutory party committees are not required by statute to use this form.

Help for DR-2 Schedule H1 Inventory

<u>Schedule H1 Form Fields:</u>

Name	Type	Required
Date	Select Box	Yes
Current Value Amount	Numeric	Yes
Price Paid Amount	Numeric	No
Value Estimated	Checkbox	No
Property	Alpha/Numeric	Yes

Schedule H1 - Inventory

1. Click on the "Inventory" tab. The first time it will show no inventory. Click on the "Add Property Acquired" button.
2. Candidates’ committees must list campaign property with a value of $500 or more when acquired. (Exception: Consumable campaign property, such as yard signs.) The property will automatically carry forward to subsequent reports. Adjust the "Current Value Amount" as needed.
3. Enter the required information for the property acquired. If the property is received as an in-kind, you may estimate the value in the "Price Paid Amount" and check the box for "Value Estimated." Describe the property in the box marked "Property." When finished, click on "Save".
4. On the next screen click on "Add Property Acquired" and follow the above steps to add additional inventory. Click on "Save".
5. If finished click on "Return to Inventory List".
6. When the report is complete, click on "DR-2 Submit".
7. **NOTE:** When the property value is less than $100 and that has been reported, it should be deleted from inventory.
8. **NOTE:** PACs and statutory party committees are not required by statute to use this form.

Help for DR-2 Schedule H2 Property Sales

Schedule H2 Form Fields:

Name	Type	Required
Purchaser	Alpha Numeric	Yes
Date	Select Box	Yes
Amount	Numeric	Yes
Y/N	Checkbox	No
Explanation	Alpha/Numeric	Yes

Schedule H2 - Property Sales

1. Click on the "Property Sales" tab. The first time it will show no property sold. Click on the "Add Property Sold" button to add a transaction.
2. The sale or donation of campaign property by a candidate's committee is reported here.
3. On the next screen click on “Add Contact, Find Committee or Find Contact” (after you have selected the Contact type to find).
4. Enter or select the contact.
5. On the next screen click on "Close".
6. You are now back to the DR-2 – Schedule H2 – Property Sales screen.
7. The information for the last contact you added will show up here, and now you can enter the property sold information for that contact.
8. Enter the required information for the property sold. List the price paid in the "Amount" field, if sold, or the estimated value, if donated. If the property was sold, check the "Y/N" box (check if property NOT donated). Describe the property in the "Explanation" box. Click on "Save".
9. On the next screen click on "Add Property Sold" and follow the above steps to add additional sales of property.
10. If finished click on "Return to Property Sold List".
11. When the report is complete, click on "DR-2 Submit".
12. **NOTE:** PACs and statutory party committees are not required by statute to use this form.

Help Main for DR-3 Statement of Dissolution

<u>DR-3 Dissolution Directions and Rules:</u>

A committee may end its filing obligation by filing a Notice of Dissolution when it has (1) paid or transferred all of its debts or obligations, (2) reduced its cash balance to zero, (3) if a candidate's committee, sold or transferred its campaign property, AND (4) filed a final report showing these transactions.

The Notice of Dissolution is to be filed within thirty (30) days of the committee's dissolution, with a copy of the final bank statement sent as soon as it is available.

Leftover funds (including, for candidates' committees, receipts from the sale of campaign property) must be distributed in a manner permitted by Iowa Code Chapter 68A.

If all of the statements listed above have been met, then you may click the DR3 Submit tab to continue.

Candidate Committees

When the committee dissolves, schedule H must be filed showing the disposal of any remaining campaign property (with a residual value of $100 or more excluding consumable campaign property, such as yard signs) by one of the following means:

1. Sale at fair market value with the proceeds treated the same as other campaign funds; or

2. Donation of the property itself to one of the recipients permitted to receive campaign funds.

All Committees

The notice of dissolution must be filed in order for your filing obligation to cease. It is required to be filed within 30 days of the committee terminating its activity. This does not apply to party committees as they are not permitted to dissolve.

Committees must preserve their records for five years or three years from the certified date of dissolution of the committee.

1. Click on the "Dissolution" tab.
2. Click on the "Dissolution Statements" tab.
3. Read "Dissolution Directions and Rules".
4. Click on the "DR3 Submit" tab.
5. If all conditions are met, enter the appropriate date (required field) and click on "Submit".